

2007 Visitor Profile Study Sussex County

Apple-Scrapple Festival, Bridgeville

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2007 Sussex County Visitor Profile Study

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INTRODUCTION

The following visitor profile for Sussex County is one of three studies for Delaware focusing exclusively on tourism which includes data for 2007 and, where appropriate, comparisons to 2006. Using TravelScope®/ DIRECTIONS® by DKS&A, and discussed further in the Methodology section, the following visitor profile was developed for Sussex County.

- In some instances, data is presented annually as well as quarterly to demonstrate the seasonality associated with tourism and tourism activities.
- The study is limited to the following three major focus areas:
 1. Visitor Volume;
 2. Trip Characteristics;
 3. Demographics.

Please be cautious in analyzing/interpreting the data in the following profile, as the numbers are based on small sample sizes.

EXECUTIVE SUMMARY

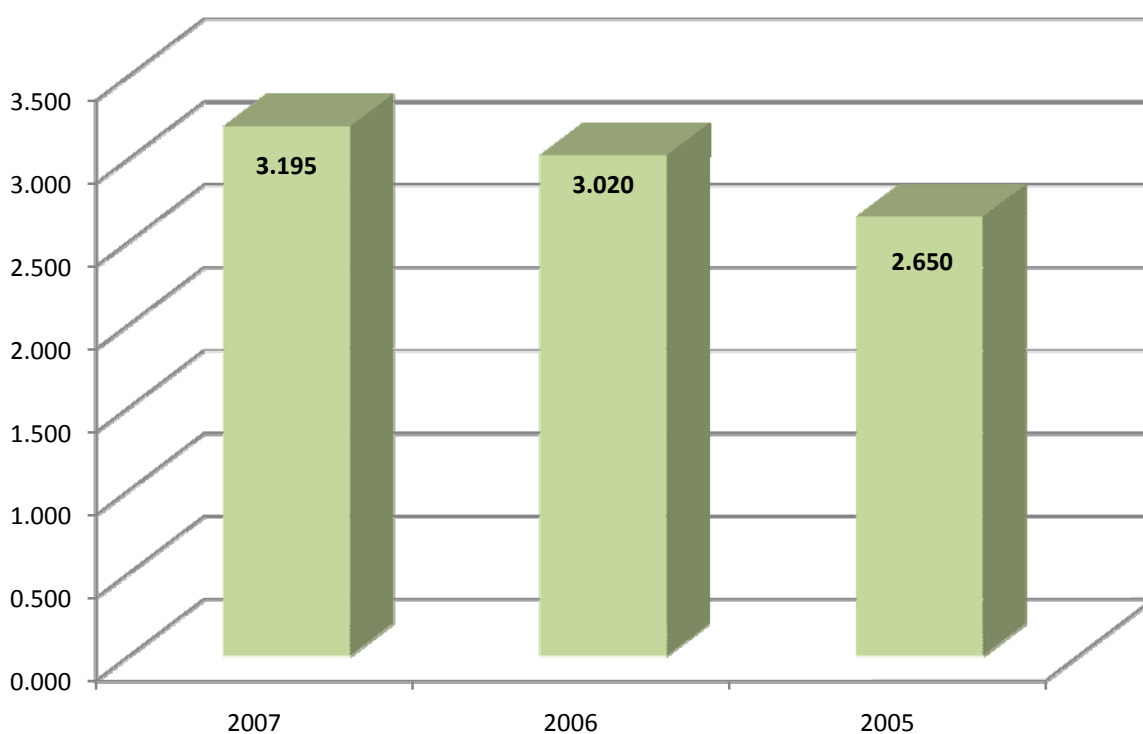
- ❖ About 3.2 million visitors traveled to Sussex County in 2007, an increase of nearly 6 percent over 3 million in 2006.
- ❖ Other than Delaware, Maryland remained the top state of origin of Sussex County visitors in 2007.
- ❖ The number of visitors to Sussex County whose primary purpose of travel was for leisure increased by nearly two percent in 2007 to around 2.4 million. Business travel to Sussex County declined about 2 percent to 690,275.
- ❖ Visiting friends and relatives was one of the most popular trip purposes for travelers to Sussex County (26%), next to a general vacation (21%).
- ❖ Personal auto travel remained the dominant form of transportation to Sussex County, accounting for 69 percent of person-trips in 2007.
- ❖ Sixty percent of travel to Sussex County in 2007 spent one or more nights per trip. The mean length of trip for Sussex County visitors was approximately 1.7 nights.
- ❖ Thirty percent of overnight visitors to Sussex County in 2007 included a stay in a hotel, motel, resort, or all suite hotel; 41 percent indicated their stay was in a home/apartment/condo, and 19 percent stayed in a private home.
- ❖ Dining was the most popular activity for Sussex County visitors (42%) followed by beach/waterfront (41%) and shopping (32%).
- ❖ Mean total trip spending was \$405 during their trip to Sussex County in 2007, a decrease of over 7 percent from 2006 (\$436).

VISITOR VOLUME

Visitor volumes – total projected person-trips are examined in this section of the profile. Characteristics include quarterly and monthly visitor volume, business and leisure visitor volume, and top states of origin of visitors to Sussex County.

The total number of projected person-trips to Sussex County in 2007 was 3.2 million. The data suggests a decrease of nearly 6 percent over 3.02 million in 2006.

**Sussex County Visitor Volume
(in millions of person-trips)**



Quarterly and Monthly Visitor Volume

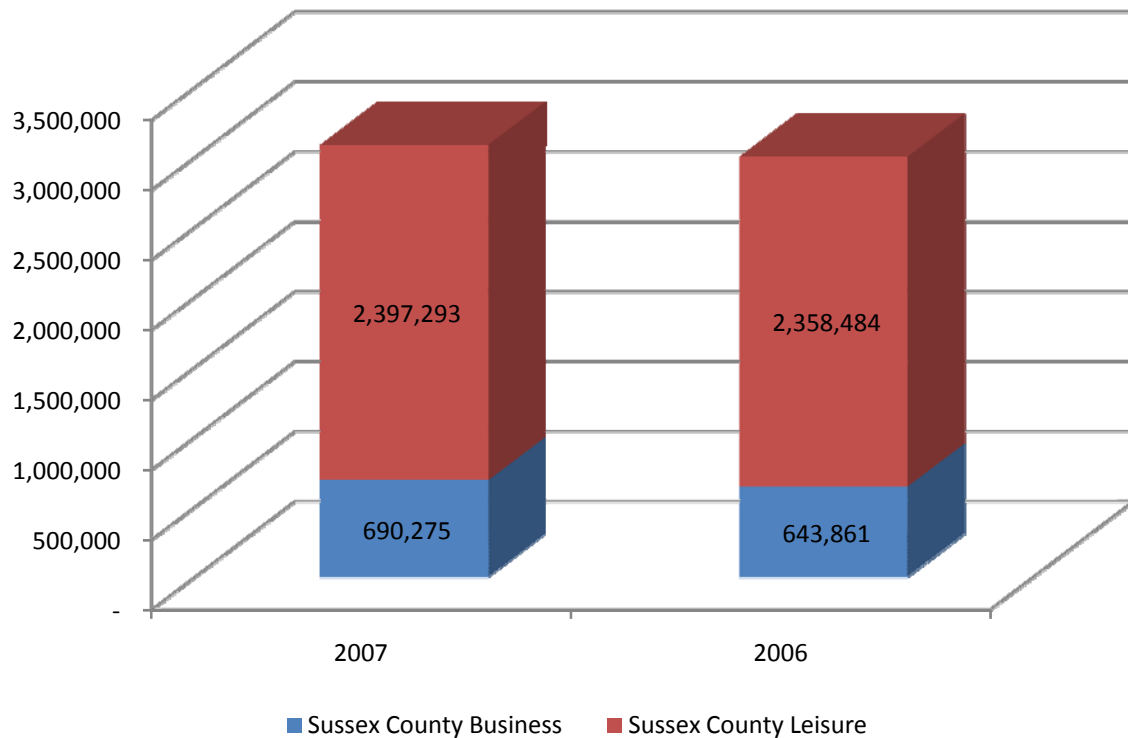
The third quarter (the quarter the trip started), including the months of July, August and September, was the most popular quarter for visitors to Sussex County. July was the highest month of travel (month trip started) for Sussex County visitors in 2007.

Timeframe	2006	2007	% Change
Quarter 1 (Jan., Feb., Mar.)	12%	11%	-1%
Quarter 2 (Apr., May, Jun.)	23%	23%	0%
Quarter 3 (Jul., Aug., Sep.)	50%	49%	-1%
Quarter 4 (Oct., Nov., Dec.)	16%	18%	2%
January	3%	3%	0%
February	5%	4%	-1%
March	4%	3%	-1%
April	8%	8%	0%
May	8%	7%	-1%
June	7%	8%	1%
July	21%	19%	-2%
August	16%	16%	0%
September	12%	13%	1%
October	4%	4%	0%
November	6%	4%	-2%
December	6%	9%	3%

Business and Leisure Visitor Volume

A total of nearly 2.4 million leisure person-trips and 690,275 business person-trips were taken to Sussex County in 2007. Leisure person-trips increased by 2 percent and business person-trips declined by 2 percent since 2006.

Sussex County Business and Leisure Visitor Volume

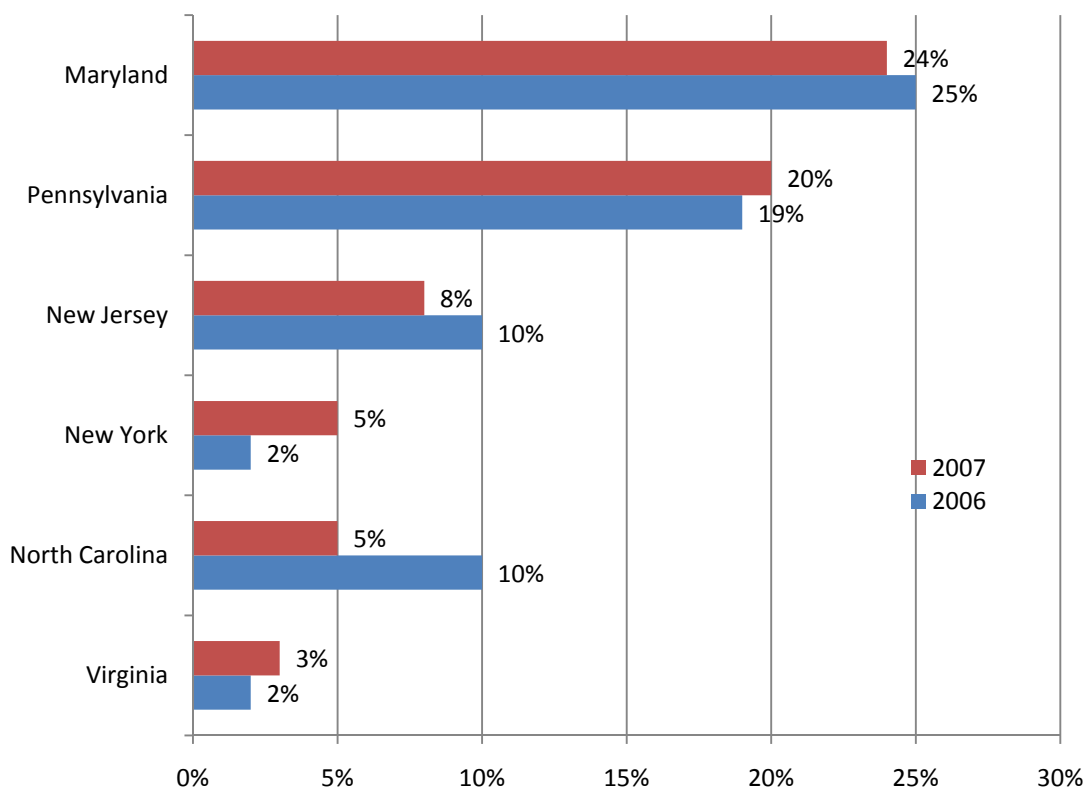


Top States of Origin

Other than Delaware, Maryland remained the top state of origin of Sussex County visitors in 2007. The share of person-trips from Maryland decreased to 24 percent from 25 percent in 2006.

Other top states of origin for out-of-state visitors to Sussex County in 2007 were Pennsylvania (20%), New Jersey (8%), New York (5%), North Carolina (5%) and Virginia (3%).

Top States of Origin of Sussex County Visitors



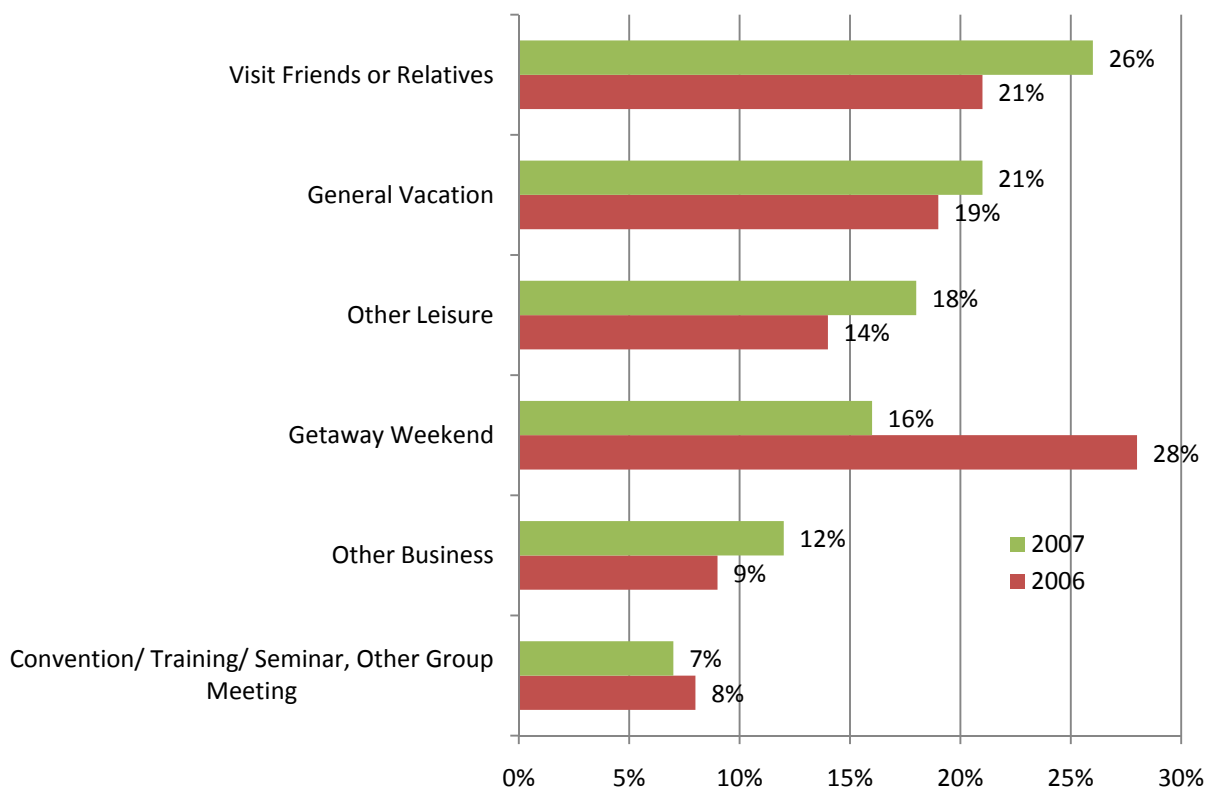
TRIP CHARACTERISTICS

This section of the report contains detailed characteristics of visitors to Sussex County. Characteristics include primary purpose of trip, primary mode of transportation, trip duration, accommodation type, travel party size, activities and expenditures.

Primary Purpose of Trip

Leisure travel purposes include visiting friends or relatives, getaway weekend, general vacation, or other leisure. Business purposes include convention, training/seminar, other group meeting, or other business. Visiting friends and relatives continues to be the most popular trip purpose for travelers to Sussex County in 2007.

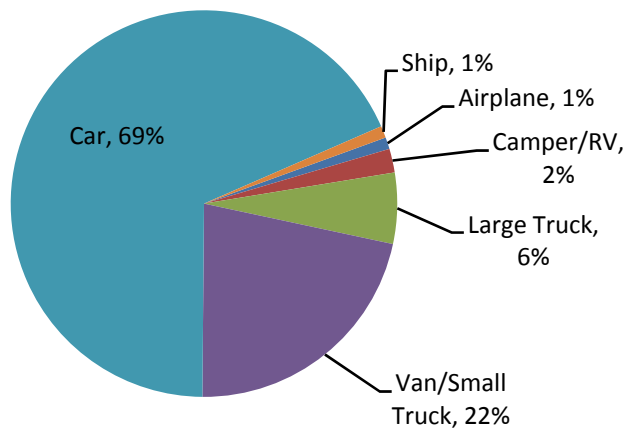
Primary Purpose of Trip for Sussex County Visitors



Primary Mode of Transportation

The dominant form of transportation to Sussex County in 2007 continues to be personal auto travel. The remainder of Sussex County visitors traveled by other means, such as a van or small truck, or large truck as their primary mode of transportation.

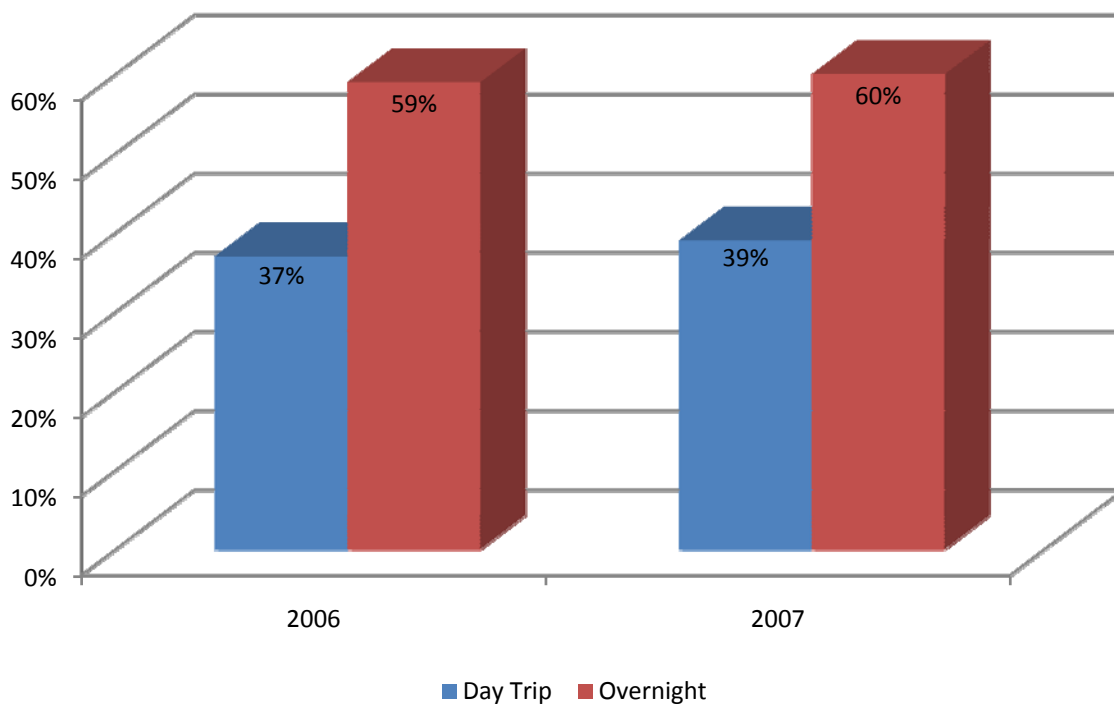
Primary Mode of Transportation for Sussex County Visitors 2007



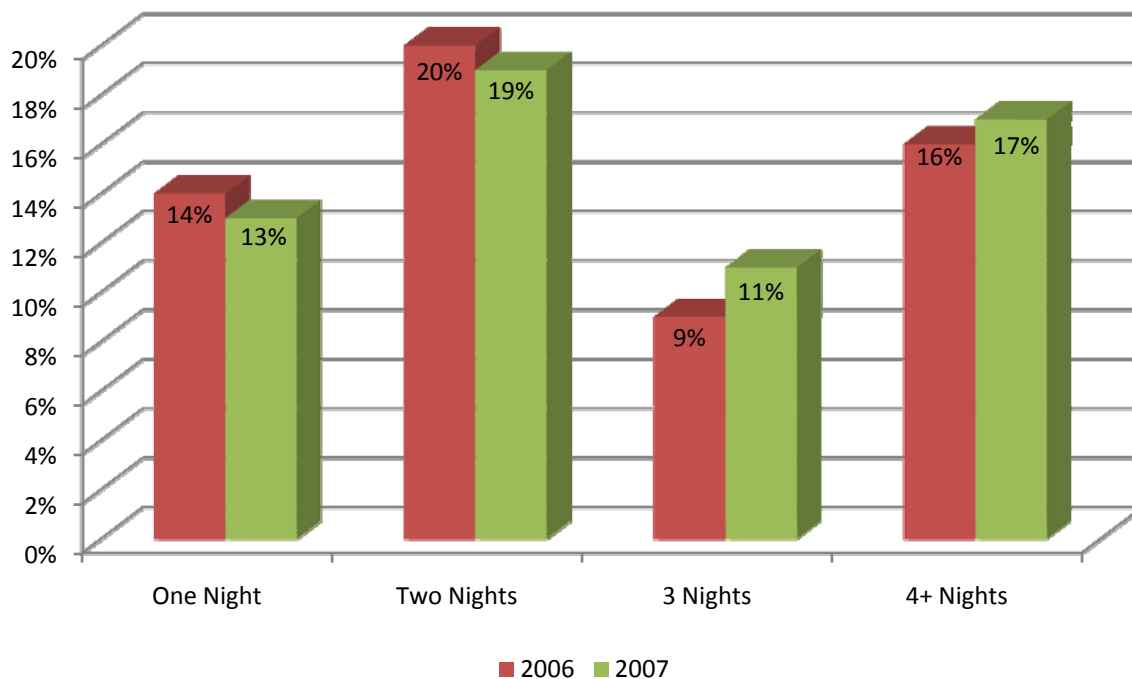
Trip Duration

The majority of Sussex County person-trips in 2007 were overnight (60%); thirty-nine percent were day trips. Sussex County visitors stayed an average of 1.7 nights per trip taken.

Sussex County Trip Duration



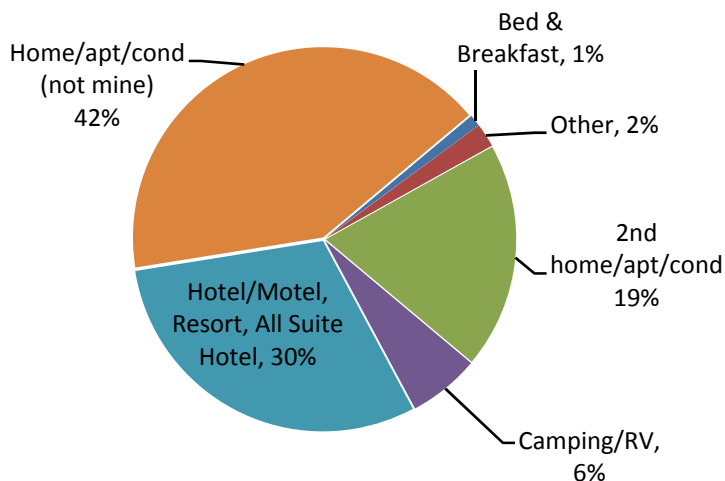
Overnight Trip Duration in Sussex County



Lodging Use

A private home, apartment, condominium was the most popular type of lodging for overnight person-trips to Sussex County in 2007, followed by hotels, motels, and resorts.

Accommodation type in Sussex County in 2007



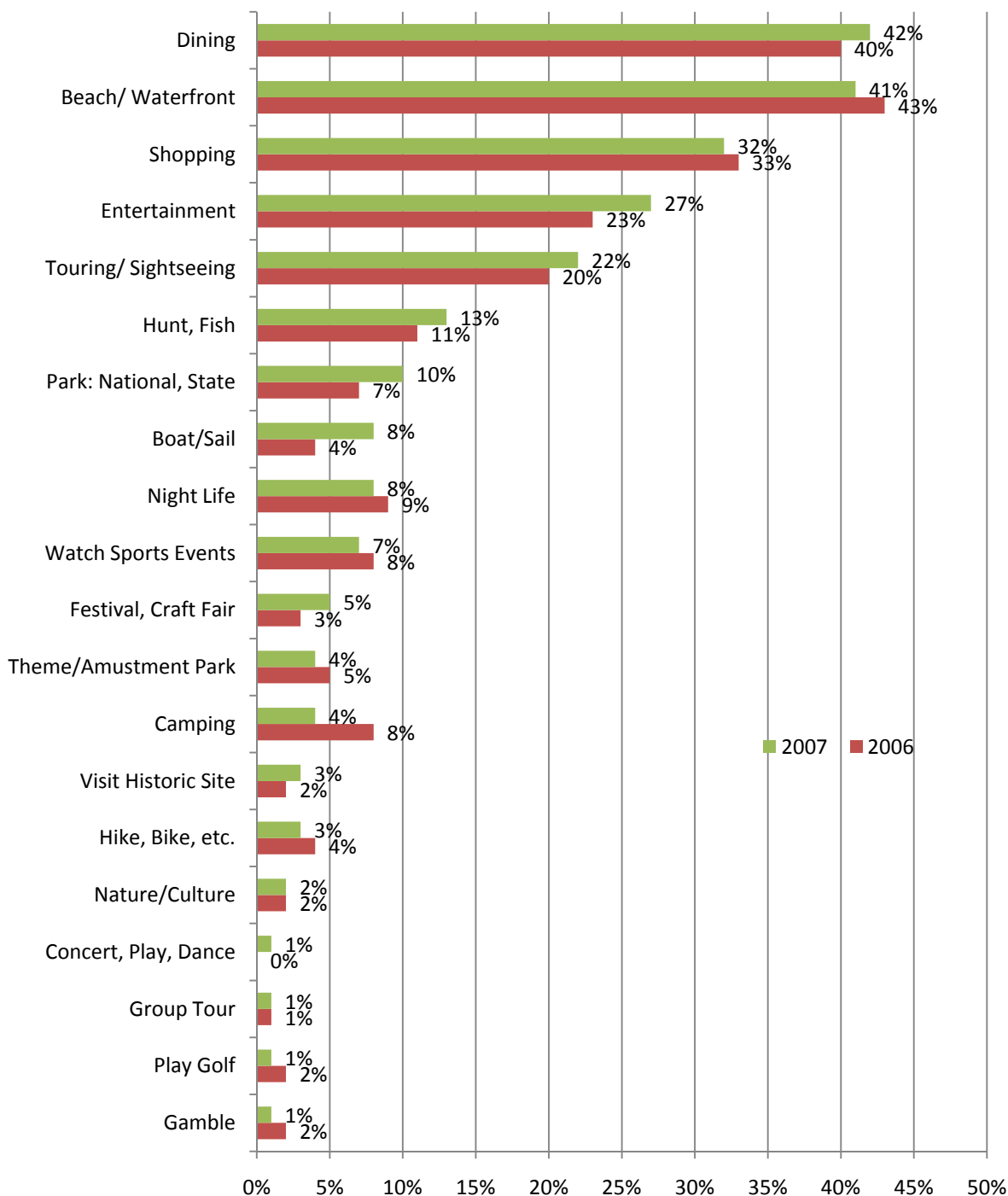
Travel Party Size

Sixteen percent of visitors to Sussex County traveled alone in 2007; thirty-four percent of visitors consisted of two people. The average travel party included 2.1 persons from the household in 2007.

Activities

Dining and beaches were the most popular activities for Sussex County visitors in 2007, with 42 percent of person-trips included dining and 41 percent included beaches. Other popular activities included shopping (32%) and entertainment (27%).

Trip Activities in Sussex County



Trip Spending

Mean trip spending decreased slightly in 2007. Households visiting Sussex County spent an average of \$405 in 2007 as opposed to \$436 in 2006.

Sussex County Total Trip Spending



DEMOGRAPHICS

The demographics of visitors to Sussex County are examined in this section.

The mean age of Sussex County visitors in 2007 was 45 and the mean income of households visiting Sussex County was \$78,129.

Sussex County 2007

Household Size	
1 Member	12%
2 Members	45%
3 Members	23%
4+ Members	20%
Marital Status	
Now Married	71%
Never Married	17%
Divorced/Widowed/Separated	12%
Children in Household?	
Yes	30%
No	70%
Education	
Some High School	1%
Graduated High School	37%
Attended College	25%
Graduated College	23%
College Post Grad	14%
Occupation	
Retired, Student, Other	38%
Manager, Professional	26%
Tech, Sales, Admin	18%
Service	8%
Craftsman, Repairman	4%
Operator, Laborer	7%
Farming, Forestry, Fishing	0%
Employment	
Full-Time	68%
Retired	17%
Not Employed	7%
Part-Time	8%
Household Income	
\$75,000 and over	62%
\$25,000 - \$49,999	15%
\$50,000 - \$74,999	19%
Under \$25,000	4%

APPENDICES

METHODOLOGY

TIA TravelScope®/***DIRECTIONS***® by DKS&A program is a large-scale, on-going survey that tracks the American consumers' travel behavior and provides a comprehensive snapshot of the U.S. domestic travel and tourism market. The program produces quarterly travel and tourism reports that describe national and state-level information on trip volume, trip and traveler characteristics, and overall travel patterns.

The powerful TIA TravelScope®/***DIRECTIONS***® by DKS&A program is a product of the partnership between the Travel Industry Association of America (TIA) and DK Shifflet & Associates, Ltd. (DKS&A). The survey is based on information collected since the 1980s through DKS&A's ***DIRECTIONS***® survey. Since its inception, the ***DIRECTIONS***® program has been recognized as an important source of information for the travel and tourism industry.

Statistical reliability of the TIA TravelScope®/ ***DIRECTIONS***® by DKS&A study is excellent. With over 60,000 traveling households measured each year, the national results have a margin of error of +/-0.4 percentage points at the 95% the confidence interval.

The TIA TravelScope®/ ***DIRECTIONS***® by DKS&A survey utilizes a consumer mail panel sample of nearly 1.5 million households (U.S. census balanced).

- Each mailing goes to an average of 45,000 different households per month (12 times per year).
- In 2005 approximately 60,000+ traveling households in the mail panel responded.
- In 2005 DKS&A captured an additional 16,000 traveling household via the Synovate Internet panel.
- As a result of continued data collection and testing, DKS&A has developed the ability to integrate and properly weight the data from the mail and internet panels.

The 45,000 average monthly mail-out is demographically balanced to the United States population. Returned sample is also demographically re-balanced to ensure that it is representative of, and truly reflects, the U.S. population. Key measures for re-balancing are:

- Origin State (household of respondent)
- Age
- Household Income
- Gender
- Household Size (number of adults in household)
- Education Level

Population figures are sourced from the U.S. Bureau of the Census and the Bureau of Labor Statistics' Current Population Survey.

GLOSSARY OF TERMS

Activities: TIA TravelScope®/ ***DIRECTIONS®*** by **DKS&A** gathers information on 23 different activity categories:

- (1) ECO-Travel
- (2) visit parks: national, state, etc.
- (3) visit historic sites
- (4) visit art museums, art exhibits, etc.
- (5) attend concert, play, dance, etc.
- (6) attend festival, craft fair, etc.
- (7) go to night life
- (8) gamble
- (9) watch sports events
- (10) hike, bike, etc.
- (11) hunt, fish, etc.
- (12) snow ski, snow board
- (13) other adventure sports
- (14) play golf
- (15) go to the beach, waterfront
- (16) boat/sail
- (17) attend show: boat, car, home, etc.
- (18) go to theme/amusement parks
- (19) touring/sightseeing
- (20) look at real estate
- (21) shop
- (22) dine/eat out
- (23) go to entertainment

Annual Household Income. The total combined annual income of the household before taxes.

Business Trip. Any trip where the primary purpose of the trip is given as “convention,” “training/seminar,” or “other business.”

Census Region of Origin/Destination. Regional breakdowns as defined by the U.S. Bureau of Census:

Northeast	New England: Connecticut, Maine, Massachusetts, New Hampshire, Georgia and Vermont. Mid-Atlantic: New Jersey, New York and Pennsylvania
South	South Atlantic: Delaware, District of Columbia, Florida, Georgia, Maryland, North Carolina, South Carolina, Virginia and West Virginia. East South Central: Alabama, Kentucky, Mississippi and Tennessee. West South Central: Arkansas, Louisiana, Oklahoma and Texas.
Midwest	East North Central: Illinois, Indiana, Michigan, Ohio and Wisconsin West North Central: Iowa, Kansas, Minnesota, Missouri,

Nebraska, North Dakota and South Dakota.

West Mountain: Arizona, Colorado, Idaho, Montana, Nevada, New Mexico, Utah and Wyoming.

Pacific: California, Oregon and Washington. (Alaska and Hawaii as destinations only)

Designated Market Area (DMA). Designated Marketing Areas (DMAs) are areas of television coverage defined by counties that are based on surveys conducted by Nielsen Media Research. A DMA is often larger than a Metropolitan Statistical Area (MSA).

Household. Comprises all persons who occupy a “housing unit”, that is, a house, an apartment, or other group of rooms, or a room that constitutes separate living quarters.

Leisure Trip. Any trip where the primary purpose of the trip is given as “visit friends or relatives, getaway weekend, general vacation, or other leisure.”

Length of Trip or Trip Duration. The number of nights spent on entire trip.

Lifestage. Lifestage groups are based on household size and composition (e.g. number of members, marital status, presence of children), age of household head, and employment of household head.

Lodging. Information is gathered on five lodging categories: (1) Hotel/Motel, Resort, All Suite Hotel; (2) Timeshare; (3) Bed and Breakfast; (4) Camping/RV; (5) Home/apt/condo (not mine) [Private Home] (6) Ship/Cruise; (7) My 2nd home/apt/condo; and (8) Other.

Mode of Transportation. Each trip is classified according to the respondent’s answer to the question, “Primary mode of transportation.” Categories included are (1) Airplane; (2) Car; (3) Van/Small Truck; (4) Train; (5) Bus; (6) Camper/RV; (7) Large Truck; (8) Ship; and (9) Other.

Nights Away from home. The number of nights spent away from home on one trip, including nights spent at the destination and en route. It is possible for a trip not to involve an overnight stay if the traveler took at trip of 50 miles or more, one-way, and returned home the same day.

Number of Household Members on Trip. Number of household members on a trip, including the respondent.

Person-Trip. A person on a trip. If three persons from a household go together on one trip, their travel counts as one trip and three person-trips. If three persons from this household take two trips, they account for six person-trips. (A trip is counted each time one or more members of a household travel 50 miles or more, one-way, away from home or spends one or more overnights and returns.)

Trip. A household trip. The term “household trips” counts the number of trips taken by U.S. households in a year. To qualify, a “household trip” must be 50 miles or more, one-way, away from home or include one or more overnights. Respondents are instructed to not include trips commuting to/from work or school or trips taken as a flight attendant or vehicle operator.



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